DATE: August 15, 1997

DATE of REVISION: June 4, 2001

TO: Division of Water Supply Engineering Staff

THROUGH: Robert W. Hicks, Director
Office of Environmental Health Services

FROM: Robert Taylor, P.E., Director
Division of Water Supply Engineering

SUBJECT: Water - Policy
Project Tracking Log (PTLog)

DELETE: Working Memo #791

Attached to this memo is the revised User's Manual for the PTLog system. Please replace the existing manual with this manual. You will note that the major changes to the manual are (1) the removal of all references to the wastewater program with regard to project tracking, (2) updates to the MAW report which reflect the changes to the second page of the summary report in Timetrac, (3) enhancements to the search screen to provide more criteria on which to conduct searches for projects, and (4) addition of the ability to edit projects from the special reports screen.

The old version of Ptlog will be available for use if there is a need to look at historical information relative to wastewater projects. A shortcut to the old version of Ptlog will be provided on the computers of both the Field Director and Deputy Field Director. Access for other field office staff may be provided at the discretion of the Field Director.

Working Memo #793

PROJECT TRACKING LOG

USER'S MANUAL

September 3, 1997

Revised June 4, 2001

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Introduction

Buttons

Buttons with an underlined Letter can be executed by holding down the ALT key and pressing the underlined letter on the keyboard.

Glossary

Project Types	Plans	Plans & specs, addenda, change orders, (see WM771, VIII, A.3)
	Applications	(see WM771, VIII, A.1)
	Reports	(see WM771, VIII, A.2)
	SDWA reports	(BSSR, CCCP, CCR's, LCR, waivers, etc.)
	Other	Miscellaneous items not identified in the above project types.

Facility Types — Further clarification about the project based on its project type and division. See page 6 for a list of the types.

Category — This heading is used when project type *Other* or *SDWA Reports* is selected. It provides further clarification about the project. These lists are maintained in the field office through the Administration option of the application.

Status Date — The date an action was performed on a project.

Action — New (received date), Scope & detail review completed, returned based on S&D, comments made, revisions received, disapproved or returned, sent to central approved from central, approved from field office.

Default — The pre-filled value of a field. Default values can be changed by the user. An example is when the user selects a City/County for a project, the *default* Assigned DE for that City/County will be displayed. The user may keep this Assigned DE or change the name to another individual.

Priority — The values are determined based on the elapsed time from the last action to the current date. This value is calculated when the application is first opened. Please see *Plans Priority Matrix* on Page 17 of this document.

Keyboard Navigation

Note: the plus sign (+), indicates that the keys are held down and executed together.

Scroll boxes	User types the characters of an item in the list until the exact match is displayed in the box. The program narrows the search with each key press.
Escape key	Cancels changes made to a field
Tab	Moves forward to the next field or button on the screen.
Shift + Tab	Moves back to the previous field or button on the screen.
Ctrl + Tab	Moves forward between subforms on the same screen. As an example on the Edit Screen, user would move to status history, then to staff assignment history, then to project notes by using this keyboard combination.

Ctrl + Shift+Tab	Reverse order of above.
Spacebar	Selects option button items or check boxes
Ctrl + D	Enters current date in any date field which is highlighted.
Ctrl + Insert	Increases any date by one day
Ctrl + Delete	Decreases any date by one day

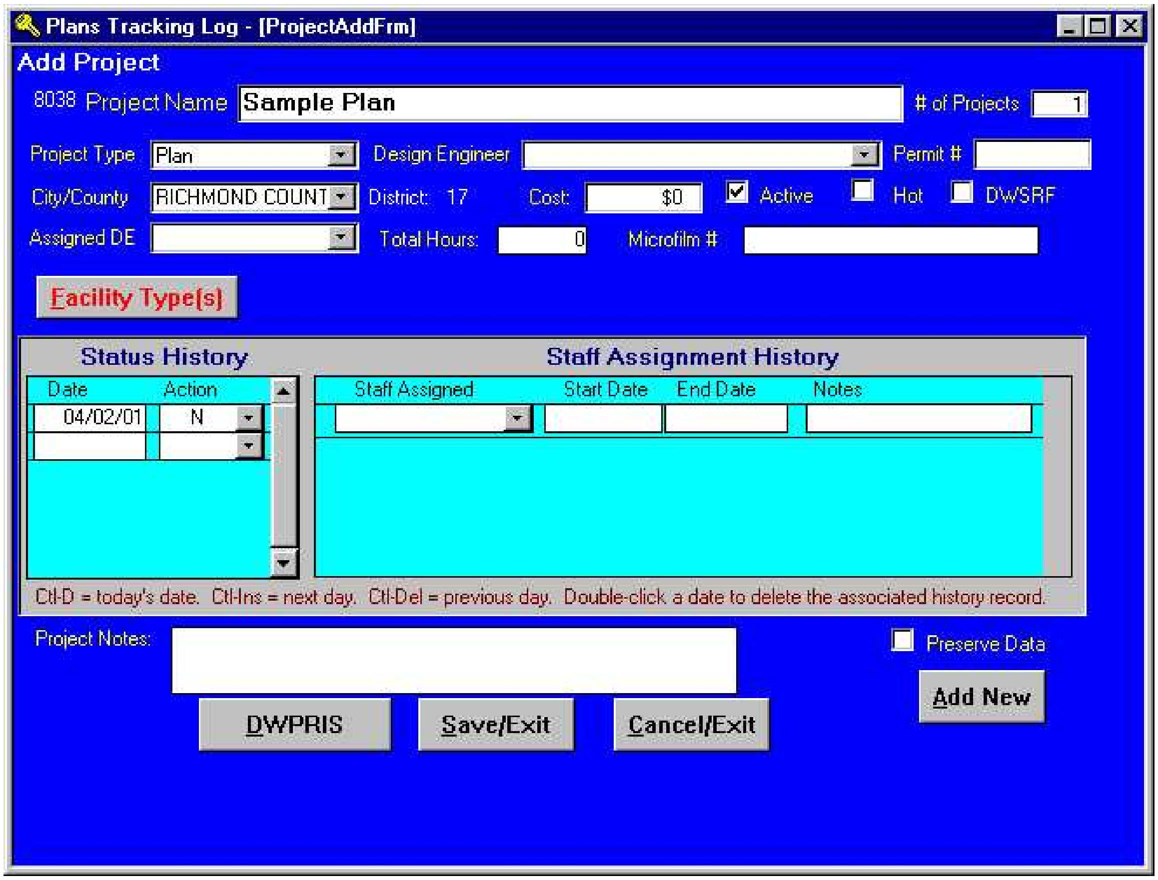
Main Menu

Buttons

- Add New - Transitions to the Add Project Screen. See *Adding New Projects* Page 4.
- Edit Existing - Transitions to the Edit Project Screen. See *Editing Existing Projects* Page 7.
- Reports - Transitions to the Reports Menu. See *Reports* Page 11.
- Exit System -Exits the Project Tracking System.
- Admin - Visible only when the user moves the mouse over the lower, right-hand corner of the screen. User is prompted for the administration password. If the password is correct, program transitions to the Administration Menu.

Adding New Projects

Displayed from the ADD NEW button of the Main Menu.



Buttons

- DWPRIS - Generates the Drinking Water Project Review Initiation Sheet in Print Preview mode. This button is only available for Project Type – Plan. An example of the initiation sheet can be found on page 21 of this manual.
- Save/Exit - Saves the record and transitions to the Main Menu. See *Main Menu* Page 3.
- Cancel/Exit - Does NOT save the record and transitions to the Main Menu. See *Main Menu* Page 3. Note: This screen requires data to be entered into the Project Name field even if cancellation of the record is desired.
- Facility Type(s) - Displays a pop-up screen of facility types associated with the Project Type. See *Facility Types* Page 6. This button is only available for Project Types - Plan, Application, and Report. Once a user has selected a Facility type, the facility name(s) selected will display to the right of the Facility Type(s) button.
- Category - Displays a pop-up screen of categories associated with the Project Type. See *Categories* Page 7. This button is only available for Project Types - Other and SDWA Report. The button will be displayed once the user selects a Project Type. Once a user has selected a Category, the Category name selected will display to the right of the Category button.

- Add New - Saves the record and clears the screen for entry of another new project. If the mandatory fields have not been completed (See *Fields* Page 5), the user is prompted to complete the record.
- Preserve Data - check box which toggles off and on. If the user marks this field (checked), the following information will automatically be filled on a new record after executing the ADD NEW button: Project Name, Project Type, City/County, Assigned DE, District, Design Engineer, Hot Priority.

Fields

Mandatory fields are in **boldface** print. Some fields are not applicable for different project types and may not be displayed.

- Number - (Counter) Top, left-hand corner of the screen. Automatic number assigned to each project record. Display only.
- **Project Name** - Name of the project. The Project Tracking Log permits duplicate names. This is the only field available when user first enters the ADD PROJECT Screen. Once the user presses the Enter key from this field, the Project Type field is displayed.
- **Project Type** - User selects from the provided list. See *Glossary* Page 1 for description of each project type. Once the user presses the Enter key from this field, the other fields associated with this type are displayed.
- **City/County** - user selects from the provided list. Once the user presses the Enter key from this field, the *default* Assigned DE will be displayed in the Assigned DE field The district number for the city/county is also displayed to the right of the field.
- **Assigned DE** - user selects from the provided list or is automatically filled by selecting City/County if a default DE has been set up through administration.
- # of Projects - numeric field. User enters the total number of titles for a project. For example if three change orders are associated with one project and entered in the same record, a value of 3 should be entered in this field. Conversely, if the three change orders are entered as independent records, a value of 1 should be entered in this field for each change order record.
- Design Engineer - User selects from the provided list. If the user enters a name which is NOT in the pick list, user is asked if the name should be added to the list. Modifications and deletions of names in this field are managed through the administration function
- Permit # - alpha-numeric field, 9 characters in length. Can be used for PWSID #'s, internal tracking numbers, etc.
- **Cost** - currency field, default amount is $0.
- **Total Hours** - numeric field, default value is 0.
- Microfilm # – alpha-numeric field, user enters the project # from the microfilm card.
- Active - check box which toggles off and on. A check mark means the project is active. Active is the default.
- Hot - check box which toggles off and on. A check mark means the project is a high priority. This will flag the project in bold on the Priority and Status Log Report.
- **DWSRF** - Drinking Water State Revolving Fund. check box which toggles off and on. Purpose is for information only.

- Project Notes - information field

STATUS HISTORY FIELDS

At least one Action and Date are required for each project.

- **Date** - Date the associated Action is performed.
- **Action** - User selects from the provided list.

STAFF ASSIGNMENT HISTORY FIELDS

To make an assignment, a staff name and start date are required. Other fields are optional.

- **Staff Assigned** - User selects from the provided list.
- **Start Date** - Date the project was assigned to the staff.
- End Date - Date the project assignment was completed.
- Notes - information field.

Facility Types

Options on this form are based on Project Type. These options are programmed into the system and can not be changed by the user or administrator. Below is a list of options for each Project Type, Division. User may select one or more facilities to describe the project.

Water Plans and Reports
Corrosion Control
Disinfection
Distribution Storage Tanks (Atmospheric)
Fe/Mn Removal
Fluoridation
Hydropneumatic Storage Tanks
Ion Exchange
Membrane Filtration
Nonconventional Treatment
O and M Manual
Other
Pump Station/Booster Pumps
Radionuclide Removal
Standard Waterline Specifications
Surface Water Treatment Plant
Surface Water Treatment Plant Modifications
Waterlines
Well

Water Applications
Community Development Block Grant
Environmental Impact Statement
VPSED Application
VWPP Application
Other

Categories

Options on this form are based on Project Type “Other” and “SDWA Reports”. Users may only select ONE category for each project.

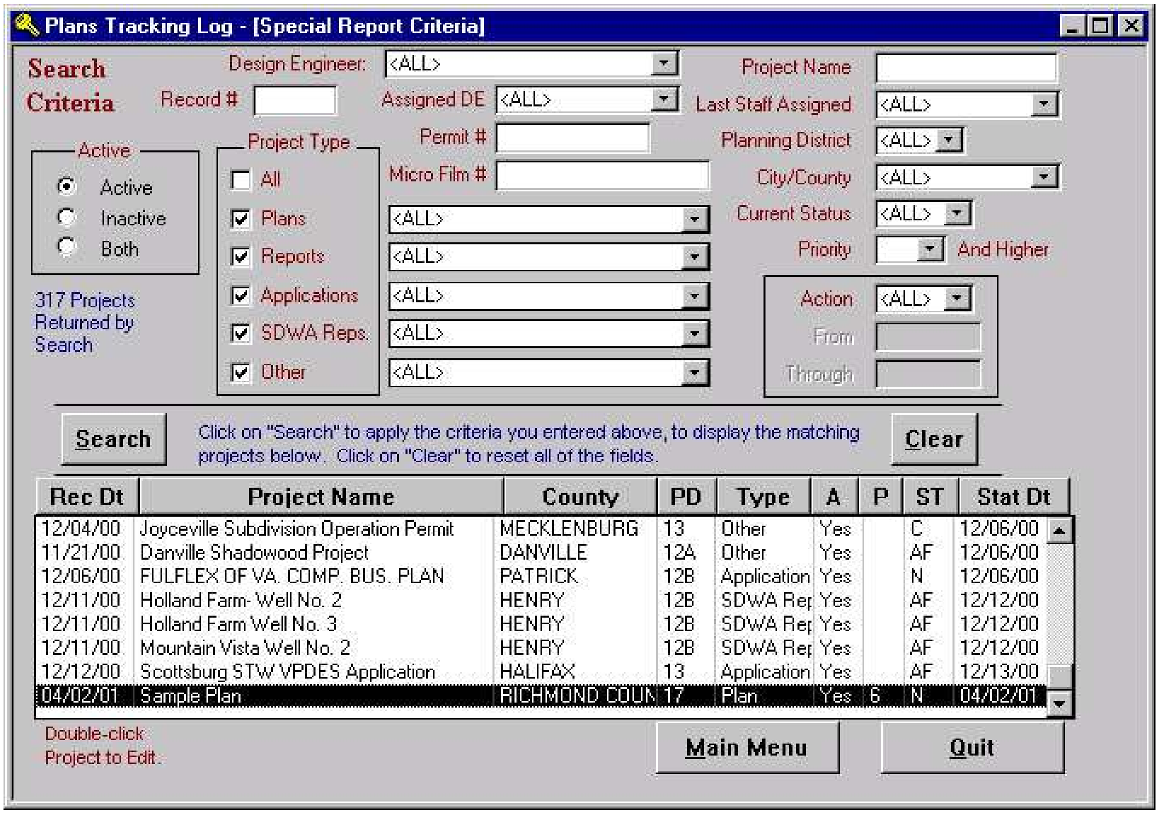
These options are maintained in each Field Office by the administrator. When creating a new category, the "ampersand" character may not be used and the name must be limited to 20 characters.

For the project type "Other", the category of "Operations Permit" may not be modified or deleted.

For the project type "SDWA Reports", the categories of BSSR, CCCP, CCR-draft, CCR-final, waiver application, LCR material survey, and corrosion control study may not be modified or deleted.

Editing Existing Projects

The search screen shown below is displayed from the EDIT EXISTING button of the Main Menu. From this screen, the user can set criteria for finding and editing an existing project in the system.



Buttons

- Main Menu - Transitions to the Main Menu. See *Main Menu* Page 3.
- Quit - Exits the Project Tracking Log Program.
- Search - Executes a search based on the selected criteria and displays the matching records in the view box. A count of the number of records returned by the search will be displayed under the "Set Search Criteria" label
- Clear - Resets all the search criteria to the form defaults. Default search is all active records.
- Buttons in the viewbox displaying the records returned by the search will sort these records by the heading. The Buttons comprising the header of the view box (display with the vertical slide bar) are used to sort the records which match the search criteria. Click on one of the buttons to sort on that "field".
- To transition to the edit screen for a project, the user must Double-click the project row in the view box.

Setting Criteria

- User selects options from Active, Project Type, Design Engineer, Assigned DE, Permit#, Microfilm #, Last Staff Assigned, Planning District, City/County, Current Status, Priority to find records matching this criteria.
- Record # - If the automatically assigned project number is known, user may enter the number in this box to quickly find the required record.
- Project Name - text entered in this field will return records with project names with matching text. Example:

  Project Name: **or**

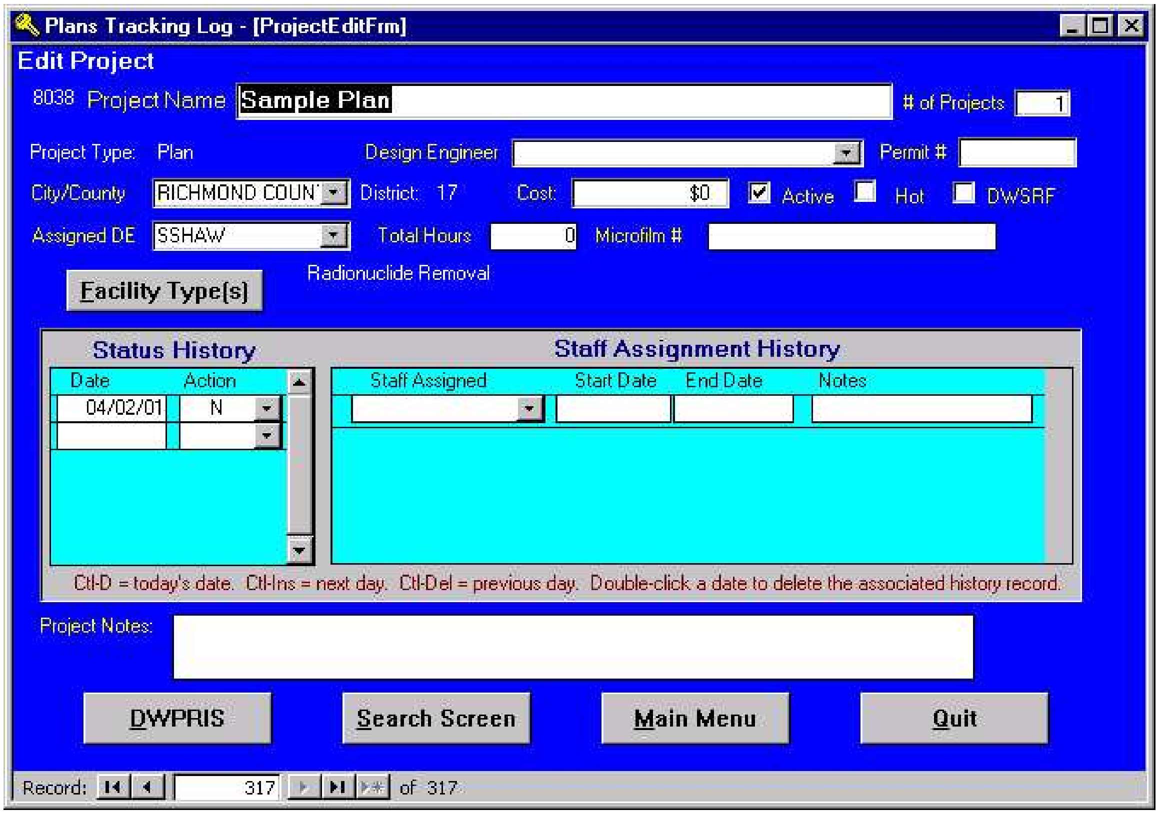
  will return records with any occurrence of the letters “or” in the project name:
  Orion Treatment Plant, N**or**thern Plains Plant, Southern Conduct**or**

  Note: Projects with an apostrophe character in the name should be searched by entering a double apostrophe character in the Project Name field. Example: C’’burg

- User may search for a particular action within a date range. After the user enters a date in the "From" field, the "Through" field automatically defaults to the current date. This may be changed by the user. Both date fields must be completed to properly execute the search.

When the user selects a project type, other than “All”, a scroll box for that type will be displayed to the right. The user can select a specific Facility or Category for the project type. If a specific Facility or Category is not selected, “<ALL>“ Facilities or Categories for that project type will be returned by the search.

The following edit screen is displayed when the user double-clicks a project from the view box on the search screen:

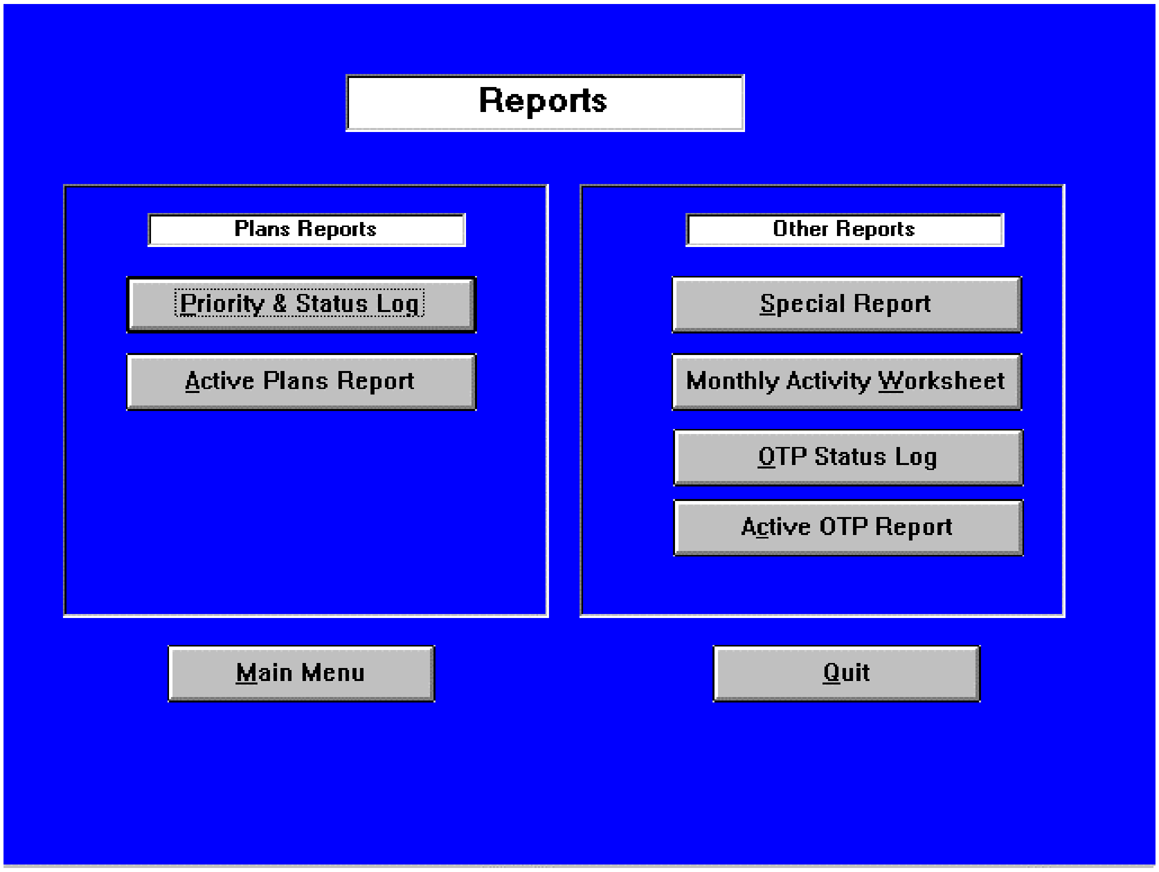


Buttons

- DWPRIS - Generates the Drinking Water Project Review Initiation Sheet in Print Preview mode. This button is only available for Project Type – Plan. An example of the initiation sheet can be found on page 21 of this manual.
- Search Screen - Saves the record and returns to the Search Screen. See Page 7.
- Main Menu - Saves the record and transitions to the Main Menu. See *Main Menu* Page 3.
- Quit - Saves the record and exits the Project Tracking Log Program.
- Other buttons and fields on this screen are identical to the Add Project Screen. For further information, See *Adding New Projects* Page 4.
- Note: Project Type can not be changed from this screen.

Reports

This screen is displayed from the REPORTS button of the Main Menu.

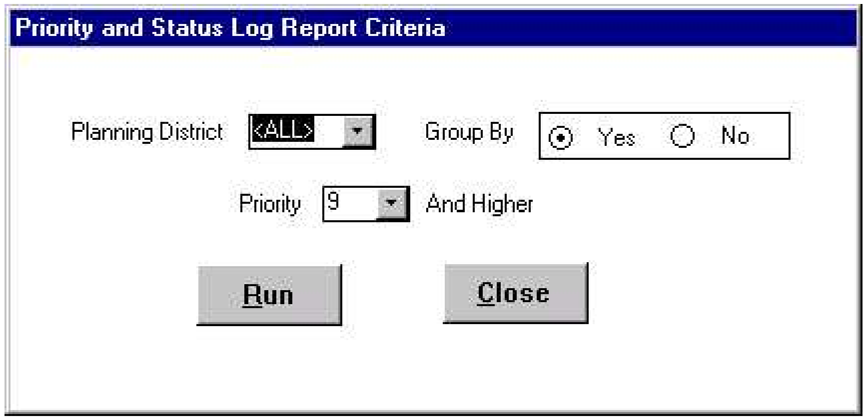


Buttons

- Main Menu - transitions to the Main Menu.
- Quit - exits the Project Tracking Log program
- Other buttons execute criteria screens for each report.

Priority & Status Log

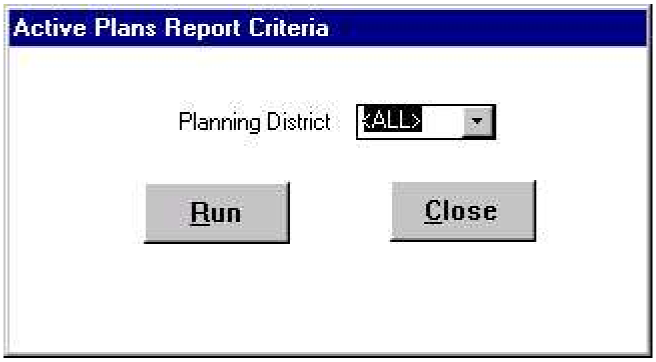
- User selects criteria for generating the report from the screen shown below:



- The “Group By” options control the way the information is arranged on the printed report. The “Group By” for Planning District is only available when “<ALL>“ planning districts are selected.
- All Project Type - PLANS which satisfy the criteria will be reported. The records will be sorted by priority (highest priority first) then by the status date. Records will be grouped by Planning District if the “group by” option for each is set to “yes”. Any project which has been flagged as a “Hot Priority” will display on this report in **boldface** print with an asterisk, regardless of its priority.
- Priority code is automatically calculated for each project based on its status and status date. Please refer to *Plans Priority Matrix* Page 17 of this manual for explanation of the priority coding process.
- Run button - generates the report in Print Preview mode.
- Close button - removes the criteria screen and returns to the *Reports Menu* Page 11.

Active Plans Report

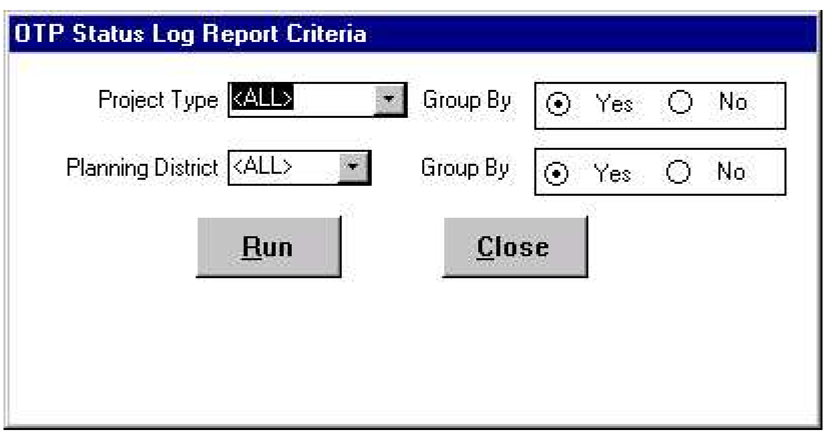
- User selects criteria for generating the report from the screen shown below:



- All ACTIVE Project Type - PLANS which satisfy the criteria will be reported. Records will be grouped by Planning District and sorted in ascending order based on Received Date.
- Run button - generates the report in Print Preview mode.
- Close button - removes the criteria screen and returns to the *Reports Menu* Page 11.

OTP (Other Than Plans) Status Log

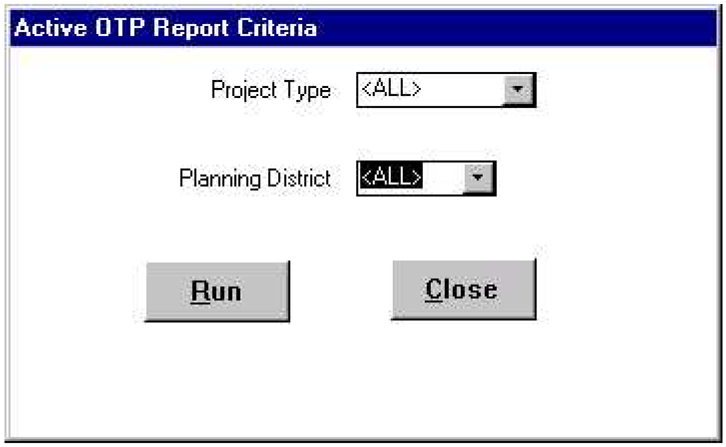
- User selects criteria for generating the report from the screen shown below:



- The "Group By" options control the way the information is arranged on the printed report. The "Group By" boxes for Planning District and Project Type are only available when "<ALL>" is chosen from the corresponding drop-down box.
- All Project Types - EXCEPT Plans which satisfy the criteria will be reported. The records will be sorted by the status date. Records will be grouped by Project Type and/or Planning District if "group by" option for each is set to "yes".
- Run button - generates the report in Print Preview mode.
- Close button - removes the criteria screen and returns to the *Reports Menu* Page 11.

Active OTP (Other Than Plans) Report

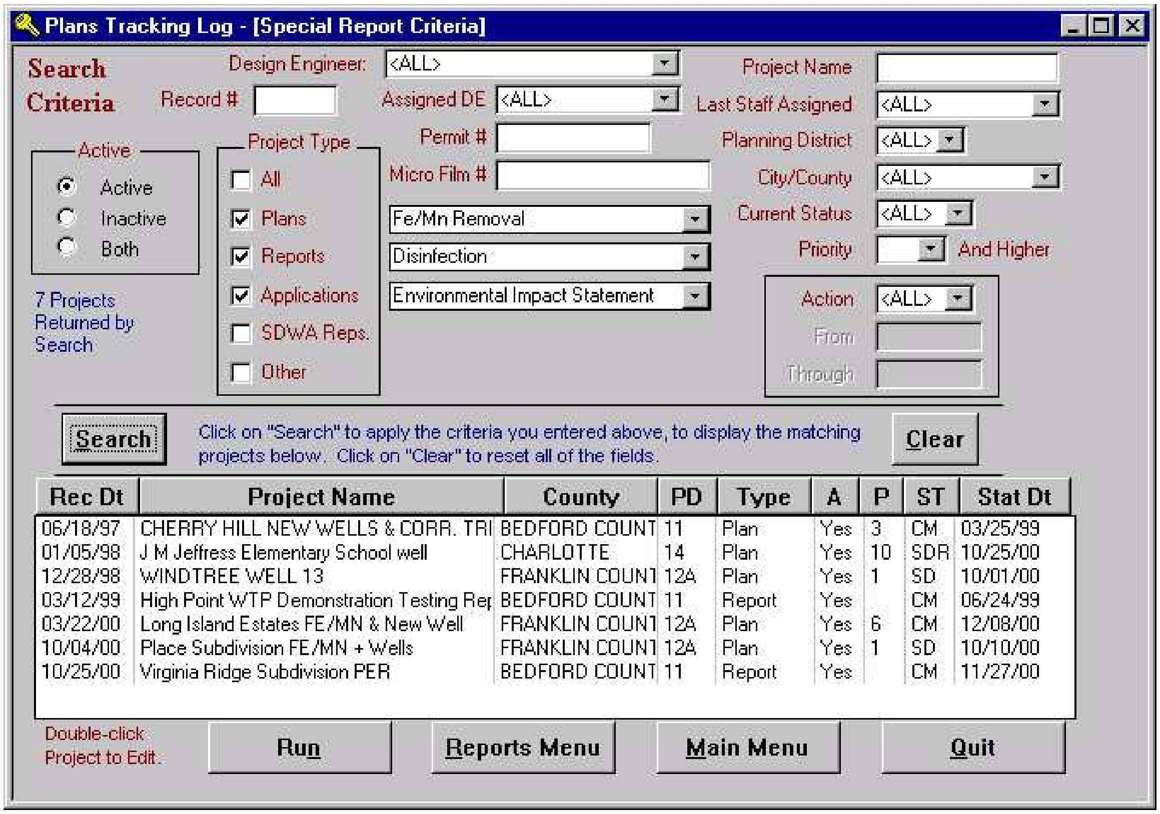
- User selects criteria for generating the report from the screen shown below:



- All ACTIVE Project Types - EXCEPT Plans which satisfy the criteria will be reported. Records will be grouped by Planning District and sorted in ascending order based on Received Date.
- Run button - generates the report in Print Preview mode.
- Close button - removes the criteria screen and returns to the *Reports Menu* Page 11.

Special Report

- User selects criteria for generating the report from the screen shown below:



- Search - Executes a search based on the selected criteria and displays the matching records in the view box. A count of the number of records returned by the search will be displayed in the top, center area of the screen.
- Clear - Resets all the search criteria to the form defaults. Default search is all active records.
- Buttons in the viewbox displaying the records returned by the search will sort these records by the heading. The Buttons comprising the header of the view box (display with the vertical slide bar) are used to sort the records which match the search criteria. Click on one of the buttons to sort on that "field".
- Run - Generates the report in print preview mode. This button is available only if projects have been returned by the search and are visible in the view box.
- Reports Menu - Transitions to the Reports Menu.
- Main Menu - Transitions to the Main Menu. See *Main Menu* Page 3.
- Quit - Exits the Project Tracking Log Program.
- User selects options from Active, Project Type, Design Engineer, Assigned DE, Permit#, Microfilm #, Last Staff Assigned, Planning District, City/County, Current Status, Priority to find records matching this criteria.

- Record # - If the automatically assigned project number is known, user may enter the number in this box to quickly find the required record.

- Project Name - text entered in this field will return records with project names with matching text. Example:

  Project Name: **or**

  will return records with any occurrence of the letters “or” in the project name:
  Orion Treatment Plant, N**or**thern Plains Plant, Southern Conduct**or**

  Note: Projects with an apostrophe character in the name should be searched by entering a double apostrophe character in the Project Name field. Example: C’’burg

- User may search for a particular action within a date range. After the user enters a date in the From field, the Through field automatically defaults to the current date. This may be changed by the user. Both date fields must be completed to properly execute the search.

- When the user selects a project type, other than “All”, a scroll box for that type will be displayed to the right. The user can select a specific Facility or Category for the project type. If a specific Facility or Category is not selected, “<ALL>“ Facilities or Categories for that project type will be returned by the search.

Monthly Activity Worksheet (MAW)

- User selects criteria for generating the report from the screen shown below:

- Month/Year field automatically defaults to one month prior to the current month. User may change this date.

- A planning district must be selected by the user.

- Run button - generates the report in Print Preview mode.

- Close button - removes the criteria screen and returns to the *Reports Menu* Page 11.

- The report will generate values which can be used to complete the monthly activity record in the Time Tracking System. The explanation of each calculated value is detailed in *MAW Report Calculations* Page 18 of this document.

APPENDIX

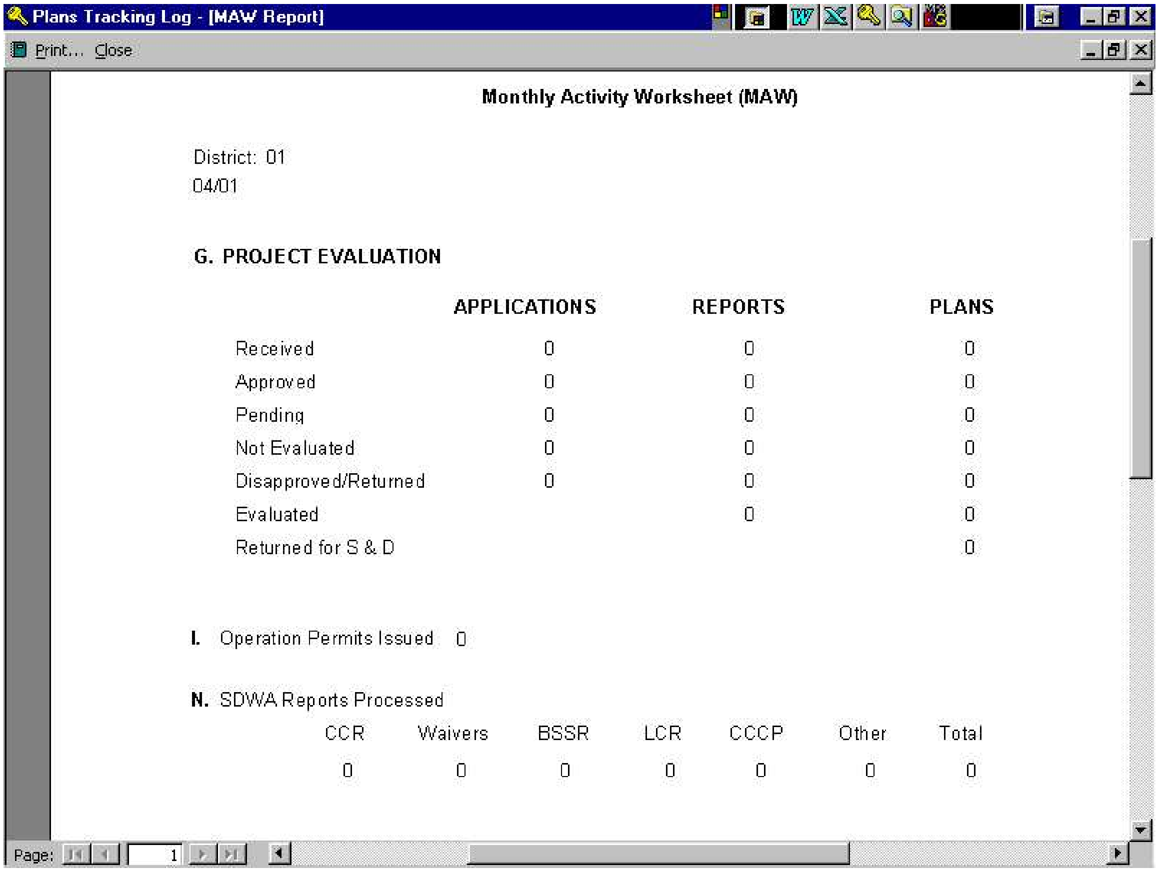
Plans Priority Matrix

	Project Actions			
# Days From Last Action	N	CM	RV	C, R, AC, AF, SDR
0 - 29	6	9	3	10
30-59	4	8	1	10
60 -89	2	7	1	10
90 - 119	1	6	1	10
120 - 179	1	5	1	10
> 180	1	3	1	10

NOTE: If the last action taken on the plan is a scope and detail (SD), the priority code is calculated based on the project's received date (N).

Action Code	Description
N	New/Received
SD	Scope & Detail
CM	Comments Made
RV	Revisions Received
SDR	S&D Returned
R	Disapproved/Returned
C	Sent to Central
AC	Approved Central
AF	Approved Field

MAW Report Calculations



ActWeight	Action Code	ActDescrip
1	N	New/Received
2	SD	Scope & Detail
3	CM	Comments Made
4	RV	Revisions Received
5	SDR	S&D Returned
6	R	Disapproved/Returned
7	C	Sent to Central
8	AC	Approved Central
9	AF	Approved Field

NOTE: If the value in the # of projects field is null or zero, a value of 1 is assumed.

<u>Section G</u>
Records are queried from the database which satisfy the district (user selected from criteria form). They are then filtered with the following ***date*** (user entered from the criteria form) criteria for each sub section:

<u>Received</u> Action Code “N” = ***date***
Sum of the # of Projects field value

Approved — Action Code "C" OR "AF" = ***date***
Sum of the # of Projects field value. If both C and AF actions occurred in the report month, the # of Projects field is counted only once.

Pending — Any Action Code <= ***date***

Refer to the action table on page 18. For each project, the program determines the MAXIMUM ActWeight . If the MAXIMUM ActWeight < 5 (N, SD, CM, RV the # of Projects field for each project is calculated for the pending value. See Example Below.

Not Evaluated — Any Action Code <= ***date***

Refer to the action table on page 18. For each project, the program determines the MAXIMUM ActWeight . If the MAXIMUM ActWeight < 3 (N, SD) the # of Projects field for each project is calculated for the Not Evaluated value. See Example Below.

Pending and Not Evaluated are accumulative numbers. A project with a received date in January will not be counted as received in March. However, if no other action has occurred to the project, it is considered still *pending and Not Evaluated* in January, February, March, etc.

Example: Reports are generated in 4/97

Project Name	ActWeight	Act Code	Date
Apples	1	N	1/97
Apples	2	SD	1/97
Apples	3	CM	2/97
Apples	4	RV	3/97
Apples	9	AF	4/97
Oranges	1	N	1/97
Oranges	2	SD	2/97
Oranges	5	SDR	3/97

Result #1:
Date Criteria: <= 2/97
Max ActID for Apples = 3 (CM)
Max ActID for Oranges = 2 (SD)
Pending = 2
Not Evaluated = 1

Result #2:
Date Criteria: <= 3/97
Max ActID for Apples = 4 (RV)
Max ActID for Oranges = 5 (SDR)
Pending = 1
Not Evaluated = 0

Result #3
Date Criteria: <= 4/97
Max ActID for Apples = 9 (AF)
Max ActID for Oranges = 5 (SDR)
Pending = 0
Not Evaluated = 0

Disapproved/Returned — Action Code "R" = ***date***
Sum of the # of Projects field value

Evaluated — two part process
Part 1 — EVERY Action code "CM" = date
If there are multiple comments made on a project in the report month, the # of projects field is multiplied by the number of comments made.

Part 2 Action Code “C” or “AF” or “R” = date
Sum of the # of Projects field value. If two of these actions occurred in the report month for a project, the # of Projects field is counted only once.

Total Evaluated is the sum of Part 1 + Part 2

Returned for S&D Action Code “SDR” = ***date***
Sum of the # of Projects field value

Section I.
Records are queried from the database which satisfy the district (user selected from criteria form) and Category (Operation Permits).

Action Code “C” OR “AF” = ***date***
Sum of the # of Projects field value. If both C and AF actions occurred in the report month, the # of Projects field is counted only once.

Section N.
Records are queried from the database which satisfy the district (user selected from criteria form), Type (SDWA Report), and Category or Categories. For example, each BSSR is counted and reported under BSSR in the MAW report. However, the categories of "Draft CCR" and "Final CCR" are both counted and reported under "CCR" in the MAW report. The categories of "LCR materials survey" and "corrosion control study" are both counted and reported under LCR in the MAW report. Any SDWA reports that are not included under a specific category in the MAW report are counted in the category of "other".

Received (information only):
Action Code “N” = ***date***
Sum of the # of Projects field value

Processed (**to be reported in Timetrac**):
Action Code “C” OR “AF” = ***date***
Sum of the # of Projects field value. If both C and AF actions occurred in the report month, the # of Projects field is counted only once.

Drinking Water Project Review Initiation Sheet

APPENDIX 18.00F

DRINKING WATER
PROJECT REVIEW INITIATION

PWSID NO: ______________

Project Title: ______________________ **VDH Project No:** ______________

Plans Dated: ______________ **Owner:** ______________________

Plans Received: ______________ **Address:** ______________________

S & D Review: ______________ ______________ **Phone:** ______________

Design Firm: ______________________

Address: ______________________

______________ **Phone:** ______________

Design Engineer: ______________________

VDH Engineer: ______________________

Comments Made: ______________ **Revisions:** ______________

Comments Made: ______________ **Revisions:** ______________

Comments Made: ______________ **Revisions:** ______________

Comments Made: ______________ **Revisions:** ______________

Comments Made: ______________ **Revisions:** ______________

Returned: ______________

Field Office Approval: ______________

PURPOSE AND SCOPE: ______________________

Date	Reviewer	Time (hours)
	TOTAL	

This is a (new/expanded) waterworks; if expanded, has water production reached 80% of design capacity? ______________

Does the owner have approved shelf specifications? ______________ **VDH Approved Date:** ______________

Project Cost (construction, legal, land, engineering, etc.): ______________

- ☐ **Corrosion Control**
- ☐ **Disinfection**
- ☐ **Distribution Storage Tanks (Atmospheric)**
- ☐ **Fe/Mn Removal**
- ☐ **Fluoridation**
- ☐ **Hydropneumatic Storage Tanks**
- ☐ **Ion Exchange**
- ☐ **Membrane Filtration**
- ☐ **Nonconventional Treatment**
- ☐ **O and M Manual**
- ☐ **Other**
- ☐ **Pump Station/Booster Pumps**
- ☐ **Radionuclide Removal**
- ☐ **Standard Waterline Specifications**
- ☐ **Surface Water Treatment Plant**
- ☐ **Surface Water Treatment Plant Modifications**
- ☐ **Waterlines**
- ☐ **Well**

GENERAL DESIGN/CRITERIA

Source Name: ______________ **Yield:** ______________ **MGD or gpm**

Design Avg Daily Flow: ______________ **gpm** **Max Daily Flow:** ______________ **gpm**

Fire Flow: ______________ **gpm for** ______________ **hours Peak Hour Flow:** ______________ **gpm**

PROJECT SKETCH (including hydraulic profile/elevations) - USE REVERSE SIDE FOR MORE ROOM: